

# SharePoint Contributor- Contributing to Lists & Documents

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## Quick Guide

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This document provides information and procedures for those with **Contribute permissions** or higher. Contributors have permission to edit pages and to add, update and delete list items and documents.


## Working with Documents and Lists

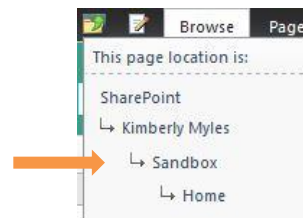
### Site Navigation

Using the *Page Up* button

Navigation allows a user to know where they are at within a site and to navigate to upper-level sites.

To navigate to an upper-level site:

1. Click the “Navigate Up” button  from the navigation bar and then click a site or sub site’s name to navigate to it.




Search


Users can search for documents, SharePoint sites and people from the top of any page in the search box. In front of the search box, there is a drop-down list that you can use to narrow or “refine” a search by a person or site.

If you receive far more search results than you were expecting, you can drill down into the results by performing the following:

1. Select the search “refiner” you want to use from the drop down list.
2. Type your search term in the search box and click the magnifying glass icon to conduct the search.
3. Click the refiner you want to use, e.g. Webpage.



 **Tip:** The only search items that will appear in search results are the items you have permission to view. The search refiner will default to your site and search only content appearing here. You can search across all sites by choosing “All sites” from the dropdown menu.

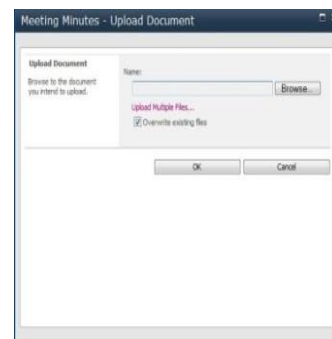
 **NOTE:** It takes a half hour for search to pick up new results, such as a newly added document or list.


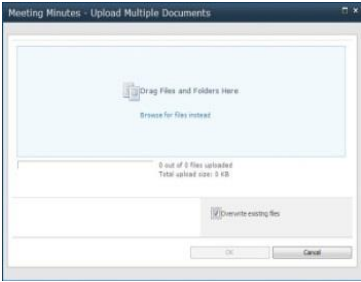


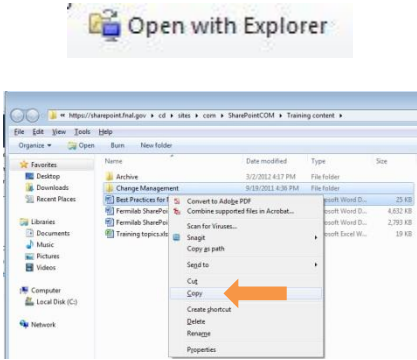
### Working with Documents


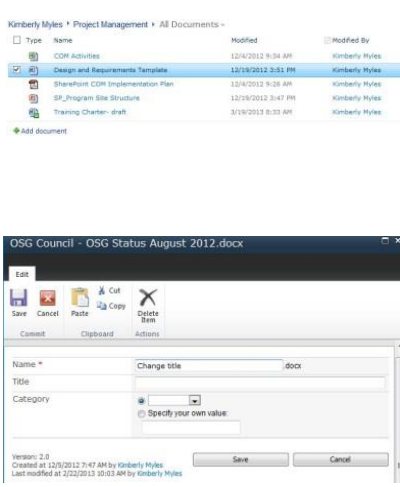
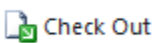


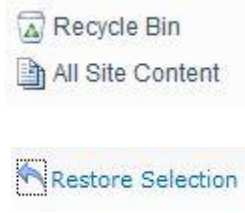
Upload a single file to a document library



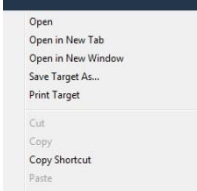
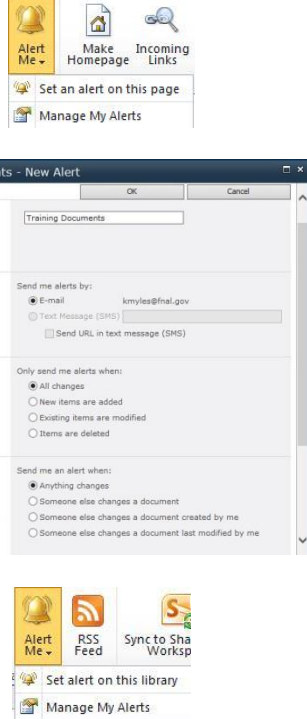
A **library** is a container that houses documents. If you have contribute permissions or higher, you can upload any type of file into a document library (PDF, Excel, Open Office, PowerPoint, .MPEG, .MOV etc.)



1. Navigate to a document library that you want to work with (any document library, i.e. “Shared Documents.”)
2. From the Library Tools menu, click the “Documents” tab.
3. From the Ribbon, click “Upload document.”
4. Click “Browse” and select a file to upload.
5. Click “OK” to upload it to the library.
6. Fill out the *Name* and *Title* fields.
7. Click “Save.”

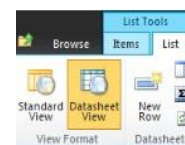
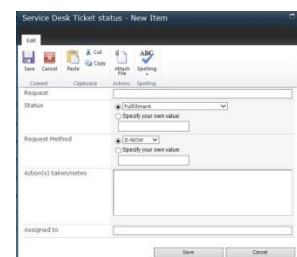


<p>Upload multiple files to a document library</p>	<p> <b>NOTE: This procedure is for PC users only. Please reference the “Using SharePoint from a Mac” training manual for the Mac-specific procedure.</b></p> <p>To upload multiple documents (or folders) to a document library:</p> <ol style="list-style-type: none"> <li>1. Navigate to the document library that you want to work with (any document library, i.e. “Shared Documents.”)</li> <li>2. From the “Library Tools” menu, click the “Documents” tab.</li> <li>3. From the Ribbon, click “Upload document.”</li> <li>4. Click “Upload Multiple files” and drag and drop the files you want to upload in the “Drag Files and Folders Here” area.</li> <li>5. Click “OK” to upload the files.</li> <li>6. When the files are done uploading, click “Done.”</li> </ol> 
<p>Move multiple documents from one document library to another</p>	<p> <b>NOTE: This procedure is for PC users only. Please reference the “Using SharePoint from a Mac” training manual for the Mac-specific procedure.</b></p> <ol style="list-style-type: none"> <li>1. Navigate to the document library destination that you would like to copy files to.</li> <li>2. From the Library Tools menu, select the “Library” tab.</li> <li>3. From the ribbon, select “Open with Explorer.” A window will appear showing any files that may appear in your destination library.</li> <li>4. Navigate to the library you want to copy files from. This could be a file server or another SharePoint document library. (If this is another SharePoint Library, repeat the steps above, select all of the files you want to copy, right click, select “Copy” and then navigate to the destination library’s Explorer View window, right click and then select “Paste” to paste your documents into the destination library.)</li> <li>5. If documents are from a local directory or file server, select the files you want to copy and navigate to the destination library Explorer View window, right click, and then select “Paste” to paste your documents into the destination library.</li> </ol> <p> <b>NOTE: You can use this same procedure to move files from one SharePoint document library to another.</b></p> 




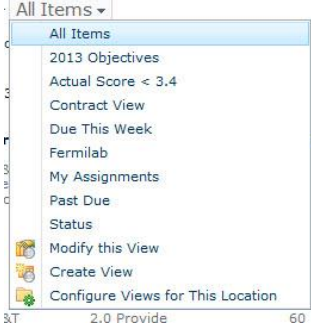

<p>Edit a document's properties</p>	<p>Document properties captures information such as the name of a document and any other metadata that users would like to capture such as a Notes field or Author field. The term Metadata refers to descriptive information about content, in this example, this applies to descriptive content about files that are uploaded to a document library. Metadata is also commonly referred to as "Content about content."</p> <p>Use the Ribbon to edit a document's properties:</p> <ol style="list-style-type: none"> <li>1. From the Document Library you are working with; check the checkbox next to the document you want to update.</li> <li>2. Under the library Tools menu, click the "Documents" tab.</li> <li>3. From the Ribbon, click "Edit Properties."</li> <li>4. Make changes such as updating the document's title and click "Save."</li> </ol> <p> <b>NOTE:</b> Depending on site design, this feature may not be turned on. Contact the site's Owner if you are unsure if this feature is available.</p>	
<p>Checking out a single (or multiple) documents</p>	<p>Checking out a file prevents other users from editing the file while you are working on it. New edits do not show until you check the file back in.</p> <ol style="list-style-type: none"> <li>1. From the Document Library, select the check box next to the document or documents you want to check out.</li> <li>2. From the "Documents" tab, click "Check Out."</li> <li>3. Click "OK."</li> </ol>	
<p>Checking in a single (or multiple) documents</p>	<p>Checking in a file allows other users to make updates and changes to the document.</p> <ol style="list-style-type: none"> <li>1. Click the check box next to the document or documents that you want to check in.</li> <li>2. From the "Documents" tab, click "Check In."</li> <li>3. From the Check in dialog box that appears, select "Yes" or "No" to keep the file checked out or not and to enter any comments you may want to include in the document's revision history.</li> <li>4. Click "OK" to check in your document.</li> </ol>	
<p>Restore a document from the recycle bin</p>	<p>If you delete a document from a Document Library, the document moves to a holding place on your site called the Recycle Bin. You can restore the document from the recycle bin within 30 days. After 30 days, you will need to open a service desk ticket to have it restored.</p> <p>To restore a deleted document:</p> <ol style="list-style-type: none"> <li>1. Click the Recycle Bin from the bottom of the left menu.</li> <li>2. Place a check mark next to any files you want to restore.</li> <li>3. Click the "Restore Selection" link to restore these documents to their original location.</li> </ol> <p> <b>NOTE:</b> If a document is not in the Recycle bin, contact the Owner for assistance in recovering the document. They may need to open a Service Desk ticket.</p>	

Email a link to a single document	<p>To email a single document:</p> <ol style="list-style-type: none"> <li>1. Select the Documents tab and the check box next to the document you want to email.</li> <li>2. From the ribbon, click “E-mail a Link.”</li> </ol> <p>Your default e-mail application will open a new message with a link to the document.</p>	
Email a link to a document library	<p>To email the entire contents of a document library:</p> <ol style="list-style-type: none"> <li>1. Select the Library tab.</li> <li>2. From the ribbon, click “E-mail a Link.”</li> </ol> <p>Your default e-mail application will open a new message with a link to the library.</p>	
Email multiple links	<p>To email multiple links to multiple documents:</p> <ol style="list-style-type: none"> <li>1. Right click on the name of the first document that you want to copy a link to.</li> <li>2. From the drop down menu that appears, select “Copy shortcut.”</li> <li>3. Repeat these steps until you have all of the documents you want to send in the email.</li> </ol>	
Subscribe to an alert	<p>To set an alert for a single document:</p> <ol style="list-style-type: none"> <li>1. Navigate to the document library that contains the document you want to set an alert for.</li> <li>2. From the document library, check the box for the document you want to set an alert for.</li> <li>3. From the Ribbon, select “Alert Me.”</li> <li>4. From the drop down menu that appears, select “Set an alert on this document.”</li> <li>5. From the New Alert form that appears, set criteria such as when to receive an alert and with what frequency and click “OK” to accept your changes.</li> </ol> <p>To Set an alert for a document library:</p> <ol style="list-style-type: none"> <li>1. Navigate to the document library that you want to set an alert for.</li> <li>2. Select the “Library” tab from the Library Tools menu.</li> <li>3. From the Ribbon, select “Alert Me.”</li> <li>4. From the drop down menu that appears, select “Set an alert on this library.”</li> <li>5. From the New Alert form that appears, set criteria such as when to receive an alert and with what frequency and click “OK” to accept your changes.</li> </ol>	

View an alert	<ol style="list-style-type: none"> <li>1. Navigate to the document library that you have an alert setup for. (This can be for either a single document or an entire library).</li> <li>2. From the Documents tab (or the Library tab), select “Alert Me.”</li> <li>3. From the drop down menu that appears, select “Manage my alerts.”</li> <li>4. From the “My Alerts on this Site” page that appears, you will be able to view any alerts that you have set up on the parent site.</li> </ol> <p> NOTE: If you want to view alerts you set up for a library on a sub-site, you will need to navigate to that library in order to view the alerts for it.</p>
Delete an alert	<ol style="list-style-type: none"> <li>1. Navigate to the document library that you have an alert setup for. (This can be for either a single document or an entire library).</li> <li>2. From the Documents tab (or the Library tab), select “Alert Me.”</li> <li>3. From the drop down menu that appears, select “Manage my alerts.”</li> <li>4. From the “My Alerts on this Site” page that appears, check the box in front of the alert you want to delete and click “Delete Selected Alerts” to delete it.</li> <li>5. Click “OK” to confirm that you want to delete this alert.</li> </ol>
Working with Lists	
Add a single item to a list	<ol style="list-style-type: none"> <li>1. Navigate to the list you want to work with and click “Add new item.”</li> <li>2. From the form that appears, make updates by filling out the field’s that you want to add data for.</li> </ol> <p> NOTE: You can also attach a file to a list item, if desired.</p> <ol style="list-style-type: none"> <li>3. Click “Save” to accept your changes. This will populate the row of data or “list item” for your list.</li> </ol>
Add multiple items to a list	<ol style="list-style-type: none"> <li>1. Navigate to the list you want to work with.</li> <li>2. From the List Tools menu, select “List”.</li> <li>3. From the Ribbon, select the “Datasheet view” button.</li> <li>4. Make updates to the entire list and click in a cell that has not been updated to save your changes.</li> <li>5. Select the “Standard View” button to get out of Datasheet view.</li> </ol>



Item ID	Item Name	Assigned To	Status	Priority	Due Date	Completion
1	SharePoint task	Emily Miles	In Progress	(3) Normal	3/28/2013	25%
2	Task 1	Emily Miles	Not Started	(3) Normal		
3	Task 2	Emily Miles	Not Started	(3) Normal		

<p>Update a list item.</p> <p>(Adding a “person” to a list field)</p>	<ol style="list-style-type: none"> <li>1. Navigate to the list that you want to work with.</li> <li>2. Check the box next to the list item you want to update.</li> <li>3. Select the “Items” tab.</li> <li>4. From the ribbon, select “Edit item.”</li> <li>5. From the form that appears, make updates and click “Save” to save your changes to the list item.</li> </ol> <p>For list items that require you to enter a person:</p> <ol style="list-style-type: none"> <li>1. Enter the services username for that individual (you can use the Fermilab Address book to find out their email address, which is their services username plus @fnal.gov - which you will need to drop)</li> <li>2. Click the checkbox icon to resolve the name in the system.</li> <li>3. Make any additional updates to your list and click “Save” to save your changes.</li> </ol>	 
<p>Looking at Different Views</p>	<p>You can change the “view” for a list by opening an alternate saved view for that list as follows:</p> <ol style="list-style-type: none"> <li>1. Navigate to the list that you want to work with.</li> <li>2. In the breadcrumb area, you will notice the default view in grey. Click the down arrow next to this default view. A dropdown menu will appear with other views you can select from.</li> <li>3. Select another view from the list. (Notice that the order of the columns in your list may change and that some columns may now be hidden.)</li> </ol> <p> NOTE: You can click the dropdown menu to select the original “All Items” view if you wish to restore the original view.</p>	
<p>Create Personal Views</p>	<p>You can create a view for a list (or library) and show or hide columns for that list (or library) in your new view.</p> <ol style="list-style-type: none"> <li>1. From the List tab, select “Create View.”</li> <li>2. Select “Standard View.”</li> <li>3. In the form that appears, name your view and select whether you want the view to be personal (for only you to see) or public.</li> <li>4. In the “Columns” field, enable checkboxes next to each column you want to display (or uncheck the columns you want to hide.)</li> <li>5. Order the columns by selecting a number next to each column name.</li> <li>6. You can filter your columns by entering conditional statements in the Filter field.</li> <li>7. You can Group your list by choosing either one or two columns to group your list by from the “Group by” field.</li> <li>8. Click “OK” to save your view.</li> </ol> <p> NOTE: You can select your “view” from the list tab dropdown menu under “Current View” to display that view of your list.</p>	